



# WELCOME TO YOUR CLIENT ACCOUNT

- Your pensions, savings and investments
- All online, in one place
- Information at your fingertips, 24/7
- Visibility and control for you
- And an end to lorry loads of paperwork

Download our app today for a  
transparent insight into your finances.

Simply search for "**HC Financial**"  
in your app store.

# WHAT YOU CAN EXPECT

## STEP 1. OPENING YOUR ACCOUNT

Like opening any account, we'll need some information to get you set up and arrange your login details. We'll do that once we've received:

- Your mobile number and email address

## STEP 2. GETTING STARTED

We'll send you a temporary password by text, and a self service ID and link to your online account by email.

When you login for the first time, you'll be asked to change your password to something more memorable for you, and to confirm some additional verification information.

And then you're ready to go.

## STEP 3. LOGGING IN

Once you're set up, simply use your self service ID (or email) and the password you've set, accessing your account through the email link we sent you.

Even better, once you've registered using the link we've sent, you can download our app. It even includes a fingerprint login feature, giving you added security and peace of mind.

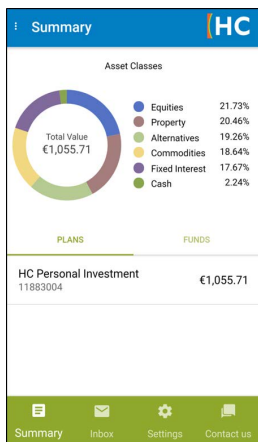
# USING YOUR ACCOUNT

A key benefit of your account is visibility and control over all of your investments, in one place.

Here are some of the things you can do.

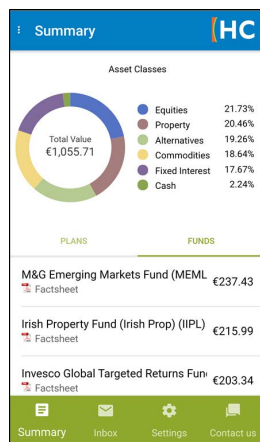
## CHECK YOUR LATEST PORTFOLIO VALUE

It's natural to want to keep track of how your portfolio is doing and its value. Your account lets you do that at any time, through a clear, visual summary.



## REVIEW YOUR FUNDS

It's easy to look up details of the funds you are invested in and their factsheets.



## KEEP THINGS UP TO DATE

From your personal details to the notifications we send you, your account gives you visibility and control.

The screenshot shows the 'Personal details' page of the HC account. At the top, it says 'Personal details' and 'HC'. Below this is a form with the following fields:

- Title: Mr
- First name: John
- Last name: Hcfinancial
- Sex: Male
- Date of birth: 01/01/1970
- Age: 47
- Contact: [Redacted]
- Address: 12 Madeup Street, The Town, Co. Clare, Clare

At the bottom, there is a navigation bar with icons for Summary, Inbox, Settings, and Contact us.

## ACCESS ALL YOUR PLAN DOCUMENTS

Your account includes a secure online document store that builds up a complete record of your policy documents, including your annual statements.

The screenshot shows the 'Inbox' page of the HC account. At the top, it says 'Inbox' and 'HC'. Below this is a search bar and a list of documents with their dates.

Document Name	Date
Annual Benefit Statement 11883004 HC Personal Inves...	20/02/2017
Plan Document 11883004 HC Personal Inves...	25/04/2016
Additional Information	25/04/2016
Additional Information	25/04/2016
Additional Information	25/04/2016
TERMS AND CONDITIONS	25/04/2016
Record of Conversation 11883004 HC Personal Inves...	07/04/2016

At the bottom, there is a navigation bar with icons for Summary, Inbox, Settings, and Contact us.

## OUR PAPER-FREE APPROACH

We'll set your online account to be paper-free unless you specifically tell us that you want your ongoing policy documents to be sent to you in the post.

**Why?** Because it's an environmentally conscious choice and means you'll always get instant access to your documents as soon as they are available.

**At your fingertips, and on the go, 24/7.**

## KEEPING YOU INFORMED

You can log in to your account at any time, but to make sure you don't miss anything important we'll send you an email and (if you're using our app) a notification each time a new document is uploaded for your attention.

Keeping you in touch and up to date with your finances.

**IT'S ALL PART OF OUR  
MODERN AND FLEXIBLE  
SERVICE AT  
HC FINANCIAL ADVISERS**

## GET IN TOUCH TO FIND OUT MORE

**HC FINANCIAL ADVISERS LIMITED  
ORANMORE BUSINESS PARK  
ORANMORE  
GALWAY**

**PHONE: 091 788 000**

**MAIL: [ADMIN@HCGROUP.IE](mailto:ADMIN@HCGROUP.IE)**